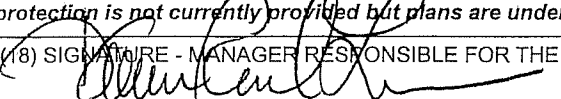


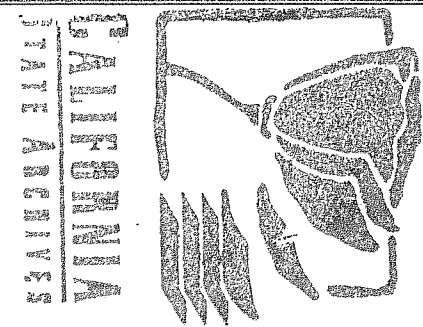
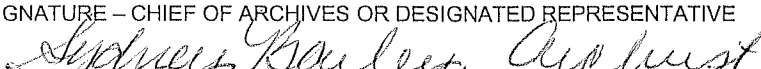


## RECORDS RETENTION SCHEDULE

Submit three copies to: Department of General Services, California Records and Information Management, 707 Third St. 2<sup>nd</sup> Fl., W. Sacramento, CA 95605.

A CalRIM Consultant may be reached by phone at (916) 375-4404, by fax at (916) 375-4408 or by email at CalRIM@dgs.ca.gov

(1) DEPARTMENT: Public Employees' Retirement System		(2) AGENCY BILLING CODE 63500		(3) PAGE 1 OF 10 PAGES
(4) DIVISION/ BRANCH/ SECTION Benefit Services Division		(5) ADDRESS 400 Q Street, Sacramento, CA 95814		
CHECK THE APPROPRIATE BOX				
(6) <input type="checkbox"/> New schedule of records that have never been scheduled. [Complete boxes (9) – (12)]				
(7) <input checked="" type="checkbox"/> Revising a previous schedule. [Complete boxes (13) – (16)] (A new approval number will be assigned.)				
(8) <input type="checkbox"/> Amending some pages of a previous schedule. [Complete boxes (13) – (16)] (The original approval number will remain in effect.)				
NEW SCHEDULE INFORMATION (If applicable)	(9) SCHEDULE NUMBER 004-1	(10) SCHEDULE DATE 9/21/07	(11) NUMBER OF PAGES 10	(12) CUBIC FEET (Total Schedule) 1889
PREVIOUS SCHEDULE INFORMATION (If applicable)	(13) SCHEDULE NUMBER 004-1	(14) APPROVAL NUMBER 02-297	(15) APPROVAL DATE (S) 10/9/02	(16) PAGE NUMBER(S) REVISED.– 11
(17) MISSION/FUNCTIONAL STATEMENT : The Benefit Services Division will continue to be an excellent provider of retirement benefits, refunds and information to our members, retirees, survivors, beneficiaries and the public. PURPOSE: The Benefit Services Division provides benefits and information to members, retirees, beneficiaries and survivors. Such services include eligibility and calculation of service and disability retirements, pre-and post-retirement death benefits, refunds and adjustments. In addition, this division responds to telephone, internet and written requests for information and other inquiries from members, employers and annuitants and ensures continuation of health benefits coverage for entitled retiring members and eligible survivors and beneficiaries.				
<b>PART I – AGENCY STATEMENTS</b>				
As the program manager (or person authorized to sign for the program manager) directly responsible for the records listed on this records retention schedule, I certify that all records listed are necessary and that each retention period is correct. <i>For revisions, all items on the previous schedule are included or accounted for on the recapitulation. Vital records identified by this schedule are protected. If protection is not currently provided but plans are underway, the details of such plans are shown in Column 45, Remarks.</i>				
(18) SIGNATURE - MANAGER RESPONSIBLE FOR THE RECORDS 		(19) TITLE Chief, BNSD	(20) PHONE NUMBER (916) 795-3332	(21) DATE SIGNED 11/8/07
In accordance with Government Code 14755, approval of this Records Retention Schedule by the Department of General Services is hereby requested. Retention periods shown have been established in accordance with the criteria set forth by Section 1667 of the State Administrative Manual.				
(22) SIGNATURE- RECORDS MGMT. ANALYST 	(23) CLASSIFICATION RMA	(24) NAME (Printed or Typed) Mary Crump	(25) PHONE NUMBER 795-3768	(26) DATE SIGNED 11/14/07
<b>PART II – DEPARTMENT OF GENERAL SERVICES APPROVAL (Per Government Code Section 14755)</b>				
(27) SIGNATURE –CalRIM CONSULTANT 		(28) APPROVAL NUMBER 08-089	(29) DATE SIGNED 2/26/2008	(30) EXPIRATION DATE 2/26/2013
<b>PART III – ARCHIVAL SELECTION (Per Government Code Section 14755)</b>			<b>FOR ARCHIVES' STAMP</b>	
THE ATTACHED RECORDS RETENTION SCHEDULE:				
(31) <input type="checkbox"/> Contains no material subject to further review by the California State Archives (32) <input checked="" type="checkbox"/> Contains material subject to archival review. Items stamped "NOTIFY ARCHIVES" may not be destroyed without clearance by the California State Archives. (Per Section 1671 of the State Administrative Manual.)				
(33) SIGNATURE – CHIEF OF ARCHIVES OR DESIGNATED REPRESENTATIVE 			(34) DATE SIGNED 3/11/08	

ITEM #	CUBIC FEET *	CA. STATE ARCHIVES USE ONLY	TITLE AND DESCRIPTION OF RECORDS (Double spaces between items)	MEDIA	VITAL	RETENTION				PRA (Exempt) & IPA	REMARK - 2 -S  (48)
						OFFICE	DEPT.	SRC	TOTAL		
(37)	(38)	(39)	(40)	(41)	(42)	(43)	(44)	(45)	(46)	(47)	

1	8	NOTIFY ARCHIVES	LEGISLATION: CHAPTERED LEGISLATION AMENDMENTS, ANALYSIS & BACKUP DOCUMENTATION	P	ACT.				ACT.		RETAIN ACTIVE UNTIL OBSOLETE (ADMINISTRATION UNIT) <u>CERTIFY DESTRUCT PAPER</u>
2	32	NOTIFY ARCHIVES	INFORMATIONAL ITEMS FOR DIV. CHIEF, ASST. CHIEF	P	ACT.				ACT.		RETAIN ACTIVE UNTIL OBSOLETE (ADMINISTRATION UNIT) <u>CERTIFY DESTRUCT PAPER</u>
3	8	NOTIFY ARCHIVES	MISC. REPORTS, POLICY MEMOS, CONSTITUENT LOGS, EXECUTIVE OFFICER REPORTS	P	ACT.				ACT.		RETAIN ACTIVE UNTIL OBSOLETE (ADMINISTRATION UNIT) <u>CERTIFY DESTRUCT PAPER</u>
4	20		SECRETARY'S WORKING FILES: SUSPENSE FILE FOR DIVISION MGMT'S CURRENT BUSINESS PERSONNEL RECORDS: ADMINISTRATIVE FORMS AND RECORDS	P	ACT.				ACT.	X/I	RETAIN ACTIVE UNTIL OBSOLETE DISCLOSURE AUTHORITY: GC SEC 6254(C) AND CC SEC 1798.34 (ADMINISTRATION UNIT) <u>CERTIFY DESTRUCT PAPER</u>
5	8	NOTIFY ARCHIVES	CHRONOLOGICAL FILES: OUTGOING LETTERS & MEMOS SIGNED BY CHIEF/ASST. CHIEF. BOARD OF ADMIN. AGENDAS	P	ACT.				ACT.		RETAIN ACTIVE THROUGH 5 YEARS DURATION PERIOD (ADMINISTRATION UNIT) <u>CERTIFY DESTRUCT PAPER</u>
6	4	NOTIFY ARCHIVES	LEGAL OPINIONS	P	PERM				PERM	X/I	RETAIN PERMANENT: BECAUSE CONTAINS INFORMATION REGARDING OPERATION POLICIES & PROCEDURES DISCLOSURE AUTHORITY: SEC 6254(K) AND EVIDENCE CODE SEC 954. (ADMINISTRATION UNIT) <u>CERTIFY DESTRUCT PAPER</u>
7	12	NOTIFY ARCHIVES	MANAGER: LEGISLATIONS CHAPTERED LEGISLATION, AMENDMENTS, ANALYSIS, BACKUP DOCUMENTATION, MEMBER FILE REVIEW	P	10 yrs.				10 yrs.		RETAIN ACTIVE UNTIL OBSOLETE (DISABILITY UNIT) <u>CERTIFY DESTRUCT PAPER</u>
8	8		ORIGINAL LEGISLATIVE LAWS (RESOURCE MATERIAL)	P	ACT.				ACT.		RETAIN ACTIVE UNTIL OBSOLETE (DISABILITY UNIT) <u>CERTIFY DESTRUCT PAPER</u>
9	28		SUPERVISOR INFO, ATTENDANCE, BASELINE, ADMINISTRATIVE, PERSONNEL RECORDS	P	ACT.				ACT.		RETAIN ACTIVE UNTIL OBSOLETE (DISABILITY UNIT) <u>CERTIFY DESTRUCT PAPER</u>

ITEM #	CUBIC FEET *	CA. STATE ARCHIVES USE ONLY	TITLE AND DESCRIPTION OF RECORDS  (Double spaces between items)	MEDIA (41)	VITAL (42)	RETENTION				PRA (Exempt) & IPA (47)	REMARK - 3 -S  (48)
						OFFICE (43)	DEPT. (44)	SRC (45)	TOTAL (46)		
(37)	(38)	(39)	(40)	(41)	(42)	(43)	(44)	(45)	(46)	(47)	(48)

10			RETIREMENT PROGRAM SPECIALIST: FILES/READY FOR DETERMINATION	M	ACT.				ACT.	X/I	RETAIN ACTIVE THOUGH DETERMINATION IF APPROVED TO RETIREMENT CALCULATION AND ADJUSTMENT SECTION, POST DEATH SECTION THE DOCUMENT MANAGEMENT CENTER (DMC). IF DENIED, TO DMC: DISCLOSURE AUTHORITY: GC SECS 6254 ©, 20134 AND 20134.1 AND CC SEC 1798.34 (DISABILITY UNIT)
11			UNAPPROVED DISABILITY FILES-SUSPENSE (PENDING DRAWERS)	M		ACT.			ACT.	X/I	RETAIN ACTIVE THROUGH DETERMINATION IF APPROVED TO RETIREMENT CALCULATION AND ADJUSTMENT SECTION, POST DEATH SECTION AND DMC IF DENIED, TO DMC. DISCLOSURE AUTHORITY: GC SEC 6254© , 20134 AND 20134.1 AND CC SEC 1798.34. (DISABILITY UNIT)
12	8		PENDING INDEPENDENT MEDICAL EVALUATIONS	P		ACT.			ACT.		RETAIN ACTIVE UNTIL SETUP COMPLETE (DISABILITY UNIT) CERTIFY DESTRUCT PAPER
13			FILES PENDING REVIEW, FOLLOW-UPS, SETUPS, APPROVAL AND PROCEDURES	M		ACT.			ACT.	X/I	RETAIN ACTIVE THROUGH DETERMINATION IF APPROVED TO RETIREMENT CALCULATION AND ADJUSTMENT SECTION, POST DEATH SECTION AND DMC IF DENIED, TO DMC. DISCLOSURE AUTHORITY: GC SEC 6254©, 20134 AND 20123.1 AND CC SEC 1798.34. (DISABILITY UNIT)
14	32		INDEPENDENT PHYSICIANS INFORMATION/APPLICATIONS	P		5 yrs.			5 yrs.		RETAIN 5 YEARS OR UNTIL OBSOLETE (DISABILITY UNIT) CERTIFY DESTRUCT PAPER
15	24		RESOURCE MATERIAL, MANUALS PRESENTATION MATERIAL, WORKSHOPS RESPONSES, TRAINING	P		5 yrs.			5 yrs.		RETAIN 5 YEARS OR UNTIL OBSOLETE (DISABILITY UNIT) CERTIFY DESTRUCT PAPER
16	16	NOTIFY ARCHIVES	LEGISLATION/REPORTS, FORMS	P		ACT.			ACT.		RETAIN ACTIVE UNTIL OBSOLETE (DISABILITY UNIT) CERTIFY DESTRUCT PAPER

ITEM #	CUBIC FEET *	CA. STATE ARCHIVES USE ONLY	TITLE AND DESCRIPTION OF RECORDS  (Double spaces between items)	MEDIA	VITAL	RETENTION				PRA (Exempt) & IPA (47)	REMARK - 4 -S  (48)
						OFFICE	DEPT.	SRC	TOTAL		
(37)	(38)	(39)	(40)	(41)	(42)	(43)	(44)	(45)	(46)	(47)	(48)

17	131		BOOKLETS, RESOURCE MATERIAL, TRAVEL CLAIMS, ATTENDANCE, SUSPENSE	P		ACT.			ACT.		RETAIN ACTIVE UNTIL OBSOLETE (DISABILITY UNIT) (PROGRAM SUPPORT SECTION) CERTIFY DESTRUCT PAPER
18	67		CALPERS INFORMATIONAL RECORDS – CUT OFF ANNUALLY	P		ACT.			ACT.		RETAIN ACTIVE OR UNTIL OBSOLETE (PROGRAM SUPPORT SECTION) CERTIFY DESTRUCT PAPER
19			MEMBER FILES	M		PERM			PERM	X/I	RETAIN PERMANENT: THE RECORDS ARE RETAINED PERMANENT IN IMAGED MEDIA PER LEGAL POLICY. DISCLOSURE AUTHORITY: GC SEC 6240©, 20134 AND 20134.1 AND CC SEC 1798
20	8		TRAINING MATERIAL, BPR RESULTS REFERENCE MATERIAL	P		ACT.			ACT.		RETAIN ACTIVE UNTIL OBSOLETE (PROGRAM SUPPORT SECTION) CERTIFY DESTRUCT PAPER.
21	8		TAX/COLA INFORMATION	P		ACT.			ACT.		RETAIN ACTIVE UNTIL OBSOLETE (PROGRAM SUPPORT SECTION) CERTIFY DESTRUCT PAPER
22	8		PROCEDURE BOOKS, DOCUMENTS ON SLIP II	P		ACT.			ACT.		RETAIN ACTIVE UNTIL OBSOLETE (PROGRAM SUPPORT SECTION) CERTIFIED DESTRUCT PAPER
23	10		PROCEDURES ON TAXES, CALCULATIONS, AND PROCESS INFORMATION MANUALS	P		ACT.			ACT.		RETAIN ACTIVE UNTIL OBSOLETE (PROGRAM SUPPORT SECTION) CERTIFY DESTRUCT PAPER
24	8		TAX GUIDES	P		ACT.			ACT.		RETAIN ACTIVE UNTIL OBSOLETE (PROGRAM SUPPORT SECTION) CERTIFY DESTRUCT PAPER
25	8		PUBLIC EMPLOYEES RETIREMENT LAW (PERL), SERVICE REQUEST DOCUMENTATION	P		ACT.			ACT.		RETAIN ACTIVE UNTIL OBSOLETE (PROGRAM SUPPORT SECTION) CERTIFY DESTRUCT PAPER

ITEM #	CUBIC FEET *	CA. STATE ARCHIVES USE ONLY	TITLE AND DESCRIPTION OF RECORDS  (Double spaces between items)	MEDIA	VITAL	RETENTION				PRA (Exempt) & IPA	REMARK - 5 -S
						OFFICE	DEPT.	SRC	TOTAL		
(37)	(38)	(39)	(40)	(41)	(42)	(43)	(44)	(45)	(46)	(47)	(48)
26	24		POWER OF ATTORNEYS, TRUST & CONSERVATORS	P		ACT.			ACT.		RETAIN ACTIVE UNTIL OBSOLETE (PROGRAM SUPPORT SECTION, WARRANTS/ROLL) CERTIFY DESTRUCT PAPER
27	8		DIVISION BUDGET	P		ACT.			ACT.		RETAIN ACTIVE UNTIL OBSOLETE (PROGRAM SUPPORT SECTION, ADMINISTRATION) CERTIFY DESTRUCT PAPER
28	12		MICROFICHE: WARRANT REGISTER, ALLOWANCE, EMPLOYER, ROLL FILES, A: ROLL LISTINGS TOTALS, B: CLAIM SCHEDULE (ROLL, DENTAL, HEALTH)	D		ACT.			ACT.		RETAIN ACTIVE UNTIL OBSOLETE (PROGRAM SUPPORT SECTION (WARRANTS/ROLL) CERTIFY DESTRUCT FILM
29	12		ELECTRONIC FUND TRANSFER (EFT) RETENTION REGISTERS	C		ACT.			ACT.		RETAIN ACTIVE UNTIL OBSOLETE (PROGRAM SUPPORT SECTION, WARRANTS/ROLL) CERTIFY DESTRUCT PAPER
30	40		DIRECT AUTHORIZATION CONTRACT FILES	P		ACT.			ACT.		RETAIN ACTIVE UNTIL OBSOLETE (PROGRAM SUPPORT SECTION, WARRANTS/ROLL) CERTIFY DESTRUCT PAPER
31	20		LISTINGS CLAIM SCHEDULE (ROLL, DENTAL, HEALTH) CONTINGENCY, RESCHEDULES	P		ACT.			ACT.		RETAIN ACTIVE UNTIL OBSOLETE (PROGRAM SUPPORT SECTION, WARRANTS/ROLL) CERTIFY DESTRUCT PAPER
32	8		ELECTRONIC FUND TRANSFER (EFT) REFERENCE/OUTPUT	C		ACT.			ACT.		RETAIN ACTIVE UNTIL OBSOLETE (PROGRAM SUPPORT SECTION, WARRANTS/ROLL) CERTIFY DESTRUCT PAPER
33	48		ELECTRONIC FUND TRANSFER (EFT) BATCHES	P		ACT.			ACT.		RETAIN ACTIVE UNTIL OBSOLETE (PROGRAM SUPPORT SECTION, WARRANTS/ROLL) CERTIFY DESTRUCT PAPER

ITEM #	CUBIC FEET *	CA. STATE ARCHIVES USE ONLY	TITLE AND DESCRIPTION OF RECORDS (Double spaces between items)	MEDIA	VITAL	RETENTION				PRA (Exempt) & IPA (47)	REMARK - 6-S  (48)
						OFFICE	DEPT.	SRC	TOTAL		
(37)	(38)	(39)	(40)	(41)	(42)	(43)	(44)	(45)	(46)	(47)	(48)
34	15		REFERENCE MATERIAL: INCLUDES VARIOUS PROCEDURAL MANUALS AND MATERIALS NEEDED FOR DAILY REFERENCE	P		ACT.			ACT.		RETAIN ACTIVE UNTIL OBSOLETE (PROGRAM SUPPORT SECTION, WARRANTS/ROLL) CERTIFY DESTRUCT PAPER
35	280		MEMBER RECORDS USED TO PAY DEATH BENEFITS AND REFUNDS	P		ACT.			ACT.		RETAIN ACTIVE UNTIL OBSOLETE (DEATH BENEFITS/REFUNDS) CERTIFY DESTRUCT PAPER
36	16		RECORD OF REFUND PAYMENTS ISSUED	D		ACT.			ACT.		RETAIN MICROFICHE ACTIVE UNTIL OBSOLETE (BENEFIT/REFUNDS) CERTIFY DESTRUCT FICHE
37	16		REFUND REPORTS, ANNUAL INFORMATION	P		ACT.			ACT.		RETAIN ACTIVE UNTIL OBSOLETE (BENEFIT/REFUNDS) CERTIFY DESTRUCT PAPER
38	36		REPORTS FOR DEATH BENEFITS PAID	P		ACT.			ACT.		RETAIN ACTIVE UNTIL OBSOLETE (DEATH BENEFITS/REFUNDS) CERTIFY DESTRUCT PAPER
39	40		LEGISLATION, REFERENCE MATERIALS, PERSONNEL FILES	P		ACT.			ACT.		RETAIN ACTIVE UNTIL OBSOLETE (DEATH BENEFITS/REFUNDS) CERTIFY DESTRUCT PAPER
40	24		RESEARCH MATERIAL, PROJECT MANUALS	P		ACT.			ACT.		RETAIN ACTIVE UNTIL OBSOLETE (DEATH BENEFITS/REFUNDS) CERTIFY DESTRUCT PAPER
41	36		CALPERS INFORMATIONAL RECORDS	P		ACT.			ACT.		RETAIN ACTIVE UNTIL OBSOLETE (SERVICE CENTER) CERTIFY DESTRUCT PAPER
42	8		PROCEDURE MANUALS	P		ACT.			ACT.		RETAIN ACTIVE UNTIL OBSOLETE (SERVICE CENTER) CERTIFY DESTRUCT PAPER

ITEM #	CUBIC FEET *	CA. STATE ARCHIVES USE ONLY	TITLE AND DESCRIPTION OF RECORDS (Double spaces between items)	MEDIA	VITAL	RETENTION				PRA (Exempt) & IPA (47)	REMARK - 7 -S  (48)
						OFFICE	DEPT.	SRC	TOTAL		
(37)	(38)	(39)	(40)	(41)	(42)	(43)	(44)	(45)	(46)	(47)	(48)

43	36	NOTIFY ARCHIVES	DATABASE & REPORTS: PAST/FAILED, SERVICE LEVEL, AGING, ERROR/WARNING LIST, SUMMARIES, EFFECTIVENESS MEASURES, AUDIT & PROOF LISTS, RAD (RETIREMENT ADJUSTMENT DATABASE) T-LOG: PAYMENT SCHEDULES, ETC.	P		ACT/ + 12 MOS.			ACT/ + 12 MOS.		RETAIN ACTIVE PLUS ADDITIONAL 12 MONTHS /INTERNAL AUDIT REPORTS (RETIREMENT CALCULATIONS & ADJUSTMENT SECTIONS) CERTIFY DESTRUCT PAPER
44	24		LEGAL OPINIONS LEGISLATION: PENDING, CHAPTERED AND AMENDED LEGISLATION BILLS, ANALYSIS, DOCUMENTATION, REPORTS AND/OR STATISTICS ON IMPACT	P		ACT.			ACT.		RETAIN ACTIVE UNTIL OBSOLETE (RETIREMENT CALCULATIONS & ADJUSTMENT SECTIONS) CERTIFY DESTRUCT PAPER
45	22		MANAGEMENT RESOURCES: SUPERVISOR'S DROP-FILES, HUMAN RESOURCES AND OTHER HANDOUTS GUIDES, 634, LEADERSHIP, TRAINING AND OTHER MATERIAL AND BINDERS, MOU, EAP, HRMS, STAFF RECOGNITION, ETC.	P C		ACT.			ACT.		RETAIN ACTIVE UNTIL OBSOLETE (RETIREMENT CALCULATIONS & ADJUSTMENT SECTIONS) CERTIFY DESTRUCT PAPER
46	266		MANUALS & BINDERS: INCLUDES CALPERS. POLICY AND PROCEDURES, CHARTS, REVISIONS, ADDITIONS, GUIDELINES, CASE SAMPLES, HANDOUTS, INSERTS, MEMORANDUMS, CIRCULAR LETTERS, INFORMATION BULLETINS, STATISTICAL AND OTHER INFORMATION, REFERENCE MATERIALS, MEETING NOTES AND DOCUMENTATION. SYSTEM ENHANCEMENTS AND CHANGES BASED ON LEGISLATION, RE-ENGINEERING OTHER PROJECTS AND IMPLEMENTATIONS	P C		ACT. + 3 YRS.			ACT. + 3 YRS.		RETAIN ACTIVE, PLUS 3 YEARS. (RETIREMENT CALCULATIONS & ADJUSTMENT SECTIONS) CERTIFY DESTRUCT PAPER ONCE OBSOLETE.
47	76		MISCELLANEOUS HOLDS & SUSPENSE DRAWERS: OUT GUIDES CONTAINING REQUEST FOR ACTION (RFA's), PORTIONS OF IMAGED FILES, RETIREMENT AND ADJUSTMENT CALCULATION OUTPUT, TRANSCRIPTS AND OTHER DOCUMENTATION. ALL AWAITING AN ACTION BEFORE WE CAN PROCEED.	P M		ACT. PERM.			ACT. PERM.		RETAIN ACTIVE UNTIL FULLY IMPLEMENTED. ALL DOCUMENTS TO BE IMAGED. CERTIFY DESTRUCT PAPER UPON COMPLETION. RETAIN PERMANENT - IMAGED DOCUMENTS (RETIREMENT CALCULATIONS & ADJUSTMENT SECTIONS)

ITEM #	CUBIC FEET *	CA. STATE ARCHIVES USE ONLY	TITLE AND DESCRIPTION OF RECORDS (Double spaces between items)	MEDIA	VITAL	RETENTION				PRA (Exempt) & IPA	REMARK - 8 -S  (48)
						OFFICE	DEPT.	SRC	TOTAL		
(37)	(38)	(39)	(40)	(41)	(42)	(43)	(44)	(45)	(46)	(47)	
48	84		PROJECTS: TESTING MATERIALS, SCRIPTS, SAMPLES, NOTES, OUTPUT, LOGS AND OTHER DOCUMENTATION FOR VARIOUS SERVICE REQUESTS, BPR, COMET, PSRP (PENSION SYSTEM RESUMPTION PROJECT)	P C		ACT. + 12 MOS.			ACT. + 12 MOS/		RETAIN ACTIVE UNTIL FULLY IMPLEMENTED. (RETIREMENT CALCULATION & ADJUSTMENT SECTIONS) CERTIFY DESTRUCT PAPER
49	158		RETIREMENT, ROLL AND ADJUSTMENT WORKLOAD: OUT GUIDES INCLUDE ARP's (ADMINISTRATION REVOLVING FUND) TO RFA'S (REQUEST FOR ACTION), CALCULATIONS OUTPUT AND TRANSCRIPTS, 614's, PAYROLL INFORMATION, CORRESPONDENCE, DOCUMENTS AND FORMS SUBMITTED BY MEMBERS AND EMPLOYERS. INCLUDE NEXT STEP AND PARTIAL RETIREMENT DOCUMENTS, PAYMENTS SCHEDULES AND OTHER RETIREMENT-RELATED INFORMATION	P M		ACT. PERM.			ACT. PERM.		RETAIN PAPER ACTIVE UNTIL FULLY IMPLEMENTED. DOCUMENTS IMAGED AND CERTIFIED DESTRUCT UPON COMPLETION RETAIN IMAGED RECORD PERMANENT. (RETIREMENT CALCULATION & ADJUSTMENT SECTIONS)
50	116		TRAINING MATERIALS: BOOKLETS, SAMPLES, FLOW CHARTS, REFERENCE AND OTHER RELATED MATERIALS.	P		ACT.			ACT.		RETAIN ACTIVE. UNTIL OBSOLETE. (RETIREMENT CALCULATIONS & ADJUSTMENT SECTIONS) CERTIFY DESTRUCT PAPER
51	2		MICROFILM - ROLL, EXECUTIVE OFFICER REPORTS, ETC.	D		10 YRS.			10 YRS.		RETAIN 10 YEARS OR UNTIL TOTAL MONIES PAID OUT OF RETIRED MEMBER RESERVE (RMR) CERTIFY DESTRUCT FILM
52	3		MICROFICHE - WARRANT HISTORY, CALPERS MEMBERSHIP APPLICATIONS	D		ACT.			ACT.		RETAIN ACTIVE, UNTIL SUPERSEDED. ALL COMPUTER OUTPUT APPLICATIONS: PE001 - ACTIVE PAYEE LIST PE002 ETC. CERTIFY DESTRUCT FILM
53	1		RECORDS RETENTION SCHEDULES (STD. 73)/ RECORDS RETENTION SCHEDULE APPROVAL REQUEST FORM	P		CURRENT			CURRENT		RETAIN AS CURRENT UNTIL REVISED CERTIFY DESTRUCT PAPER.
54			RECORDS INVENTORY WORKSHEET (STD. 70) FORM	P		CURRENT			CURRENT		RETAIN AS CURRENT UNTIL NEXT INVENTORY, OR WHEN NO LONGER NEEDED FOR REFERENCE OR ANALYSIS, WHICHEVER IS LATER. <u>CERTIFY DESTRUCT PAPER</u>



ITEM #	CUBIC FEET *	CA. STATE ARCHIVES USE ONLY	TITLE AND DESCRIPTION OF RECORDS  (Double spaces between items)	MEDIA  (41)	VITAL  (42)	RETENTION				PRA (Exempt) & IPA (47)	REMARK - 9 -S  (48)
						OFFICE	DEPT.	SRC	TOTAL		
(37)	(38)	(39)	(40)	(41)	(42)	(43)	(44)	(45)	(46)	(47)	(48)

55

1

RECORDS TRANSFER LIST (STD. 71) FORM

P

CURRENT

CURRENT

RETAIN AS CURRENT UNTIL ALL RECORDS  
HAVE BEEN EITHER DESTROYED, RETIRED  
PERMANENTLY, TRANSFERRED TO STATE  
ARCHIVES, OR WHEN NO LONGER NEEDED,  
WHICHEVER IS LATER.  
CERTIFY DESTRUCT PAPER

1889  
c.f.

Total cubic feet (paper)

ITEM #	CUBIC FEET *	CA. STATE ARCHIVES USE ONLY	TITLE AND DESCRIPTION OF RECORDS  (Double spaces between items)	MEDIA  (41)	VITAL  (42)	RETENTION				PRA (Exempt) & IPA (47)	REMARK - 11 -S  (48)
						OFFICE	DEPT.	SRC	TOTAL		
(37)	(38)	(39)	(40)	(41)	(42)	(43)	(44)	(45)	(46)	(47)	(48)

## SUMMARY OF CHANGES:

**02-297**

### ITEM #

### NEW RRS

27	Delete Warrants/Roll under old remarks, replace with Administration
28	Deleted microfilm rolls for Dental, Health – destroyed, no longer needed.
31	Language change in description to Listings Claim Schedule (Roll, Dental, Health) Contingency, Reschedules
44	Change language to Change over/under to RAD (Retirement Adjustment Database
49	Add language to PSRP (Pension System Resumption Project)
50	Change language to ARF's (Administration Revolving Fund) to RFA's (Request for Action)